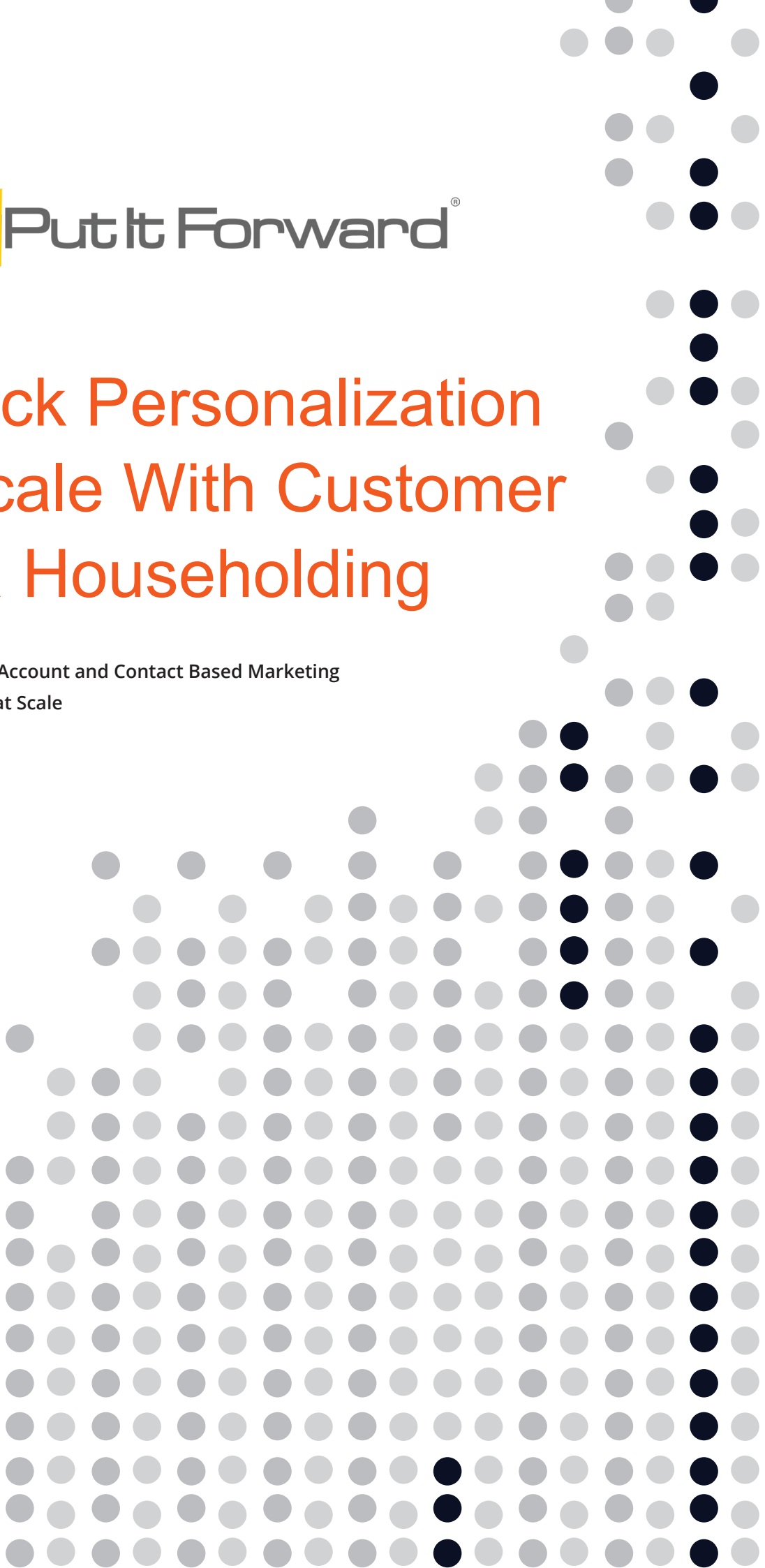




Put It Forward®

Unlock Personalization at Scale With Customer Data Householding

Approaches to Account and Contact Based Marketing
to Personalize at Scale



PROBLEM: CONNECTION FAILURE

Generalized vs Personalized Message:

Generalized messaging across customer groups where no obvious linkages exist is because segmentation is detached from the notion of householding within the audience.

The problem with this is that it becomes an impossibility to speak to any segment of your audience with any level of authority as messages become more and more uniform in their content and value proposition. Thereby drowning out your unique voice in a sea of likeness.

Household Customer Data Benefits to Marketing Approaches

- More granular customer segmentation
- Deep personalization at scale
- Identify next best actions
- Omnichannel customer preferences and behavior
- Risk identification and mitigation
- Simplifies new customer onboarding

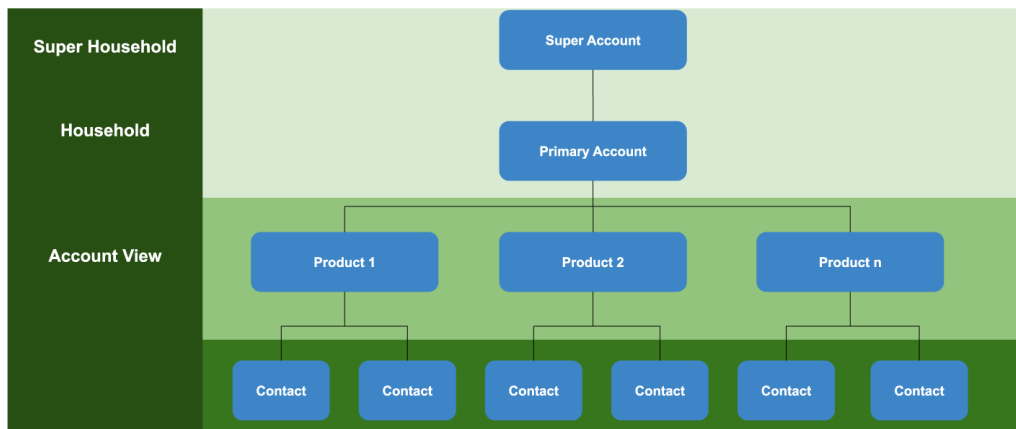


Figure 1: Traditional householding view

RESPONSE: OVER SATURATE CHANNELS

Unustainable Communication to Every Possible Segment

The response of many organizations is to create different communication programs along each possible line of segmentation. Burning resources, missing opportunity and lowering the overall efficiency of the organization.

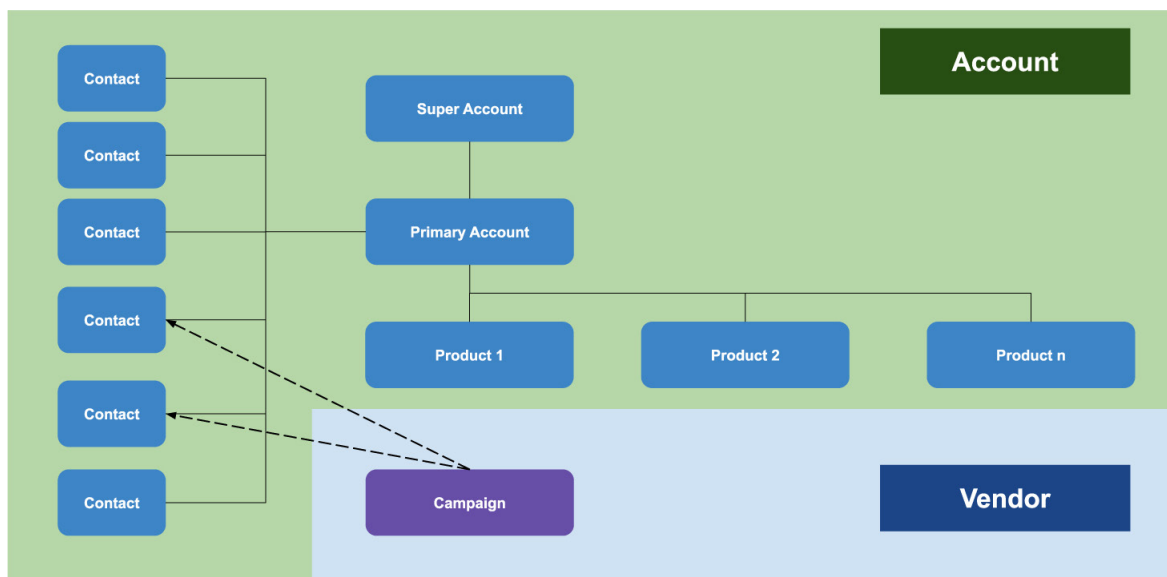


Figure 2: Marketing campaign view of account

The challenge with this is that it chooses a single path on how to engage with the audience or segment members - choosing either the individual, location, role, title or some other defined dimension limits how to respond based on engagement.

ROI: FEEDBACK LOOPS REVEAL INTENT

Unustainable Communication to Every Possible Segment

Why this is really important is because you're continuously learning about your audience through additional facts that are being gathered. It's these facts which come through things like engagement, VoC and marketing signal data which add to and fine tune the definition of a segment at any moment in time.

All of these need to be continuously fed back into your processes and decisions so you can adapt to the current sentiments within your audience's personalization needs.

There's a number of factors which come together to solve for this including householding, segmentation and intent.

To breakthrough linear one size fits all messaging the notion of householding needs to be modernized to include the concepts of traditional householding plus accounts plus products or solutions.

Challenges/Risks

- Legacy systems and approaches that limit segmentation
- Disconnected systems of record
- Technology debt
- Manual process and reliance on outdated methods
- Decentralized brand management
- Unclear view of the customer
- Weak attribution model

THE ABM HOUSEHOLD FOR CUSTOMER DATA

Simply put the definition of householding is the relationship between individuals, organizations, location at a moment in time. Extending on this digital households are ones that share devices, IP addresses and other digital identifiers. Additionally custom households are those which are defined by behaviors which are connected to you that's unique to the offering.

Within this are the concepts of superhouseholding, ultimate parent relationships and platforms.

What if you could identify new households within your audience as new data points and correlations surfaced?

Said another way how would you engage your audience differently as they expressed new relationships I.e. identified as a new type of household or a new customer?

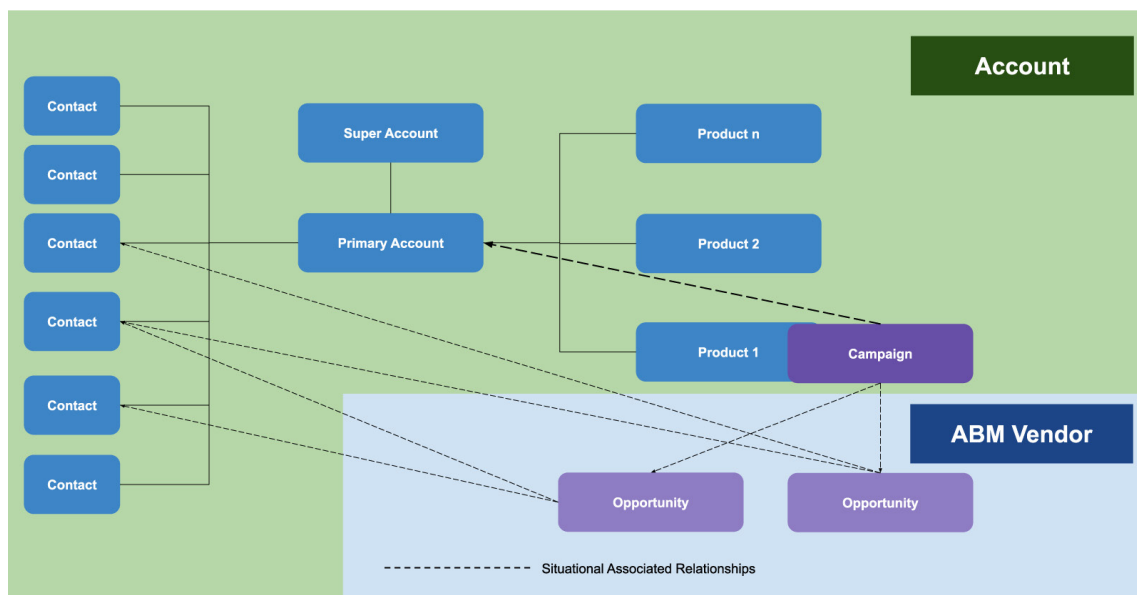


Figure 3: Marketing account based view of campaign and account that accounts for attribution

A SOLUTION APPROACH:

How to solve for personalization at scale with the notion of modern householding as a key component of your strategy. The core process of managing large household data clusters for the purpose of segmentation at scale leverages several technological components.

1. Connectivity with source systems to create a continuous flexible data integration pipeline between sources and destinations which is rules based.
2. Use identity graphs along multiple dimensions to group audiences that correlate to relationships, location, entity or products
3. Have a time based approach to identifying segments that leverages machine learning or a similar capability - the algorithms are critical
4. Surface the segments through a set of data services that are time based or temporal for syndication or consumption
5. The results sets or even individuals are then made available via the flexible integrations in step 1 into the consuming systems.

What you get as a result of this is a way to dynamically and precisely identify who your audiences are, segment with precision and confidence that your message will resonate.

Modern householding is about seeing your audience in terms of how the members relate to one another at any moment in time. By leveraging data science you can make your efforts much better and the results can be felt across the organization. Which gives you the ultimate result of being able to personalize at scale.

Benefits to IT

- More efficient use of existing resources
- Let's business focus on the messaging
- Algorithmic solutions to leveraging data value
- Modern approaches that scale on top of existing investments
- Improvement of data security and quality
- Faster time delivery and responsiveness

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